Tourism Partnership Council

2000 Report Card

Our vision:

"Realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians"

November 2000

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Nova Scotia Tourism Partnership Council activities have been extremely effective in contributing to the growth of tourism — a key economic sector that benefits all Nova Scotians.

A major objective in forming the Council was to enable the private sector to participate in decision making, to better integrate programming with private sector activities, and to drive visitation and revenue growth. The Council has many accomplishments to report.

Highlights Include:

- Developed the Nova Scotia Tourism Strategy 2000 in consultation with the tourism industry throughout the province. Our strategy focuses on growing revenues from the touring market and improving the quality of Nova Scotia's tourism products. It is a five year strategy, focusing on building a 12-month season, developing viable niche markets and improving transportation access, and the business environment for tourism.
- Developed the 2001 Marketing Plan through joint private-public committees. In 2000, our marketing plan aimed for 5 per cent growth in visitation and 6.5 per cent growth in revenues. To date industry revenues are estimated at $1.25 billion, while overall visitation is estimated at 2.17 million people. These represent a decrease of one and two per cent respectively over 1999. From the Tourism Partnership Council's perspective, we recognize that we didn't meet our ambitious industry targets for 2000. But we're pleased with the performance of our 2000 Marketing Plan. The results of the program give us confidence that we're taking the dollars entrusted to us to promote this destination. We are marketing the right products to the right people. And they are responding.
- Looking back on 2000, we have a great deal of which to be proud. We remain an important growth engine in this province. Tourism is a billion-dollar plus business that has weathered challenging times in the year 2000, and held its own in an increasingly competitive market.
- Secured dollars from the Atlantic Canada Tourism Partnership (ACTP) to promote the Nova Scotia brand, rather than marketing the province as a group with the other provinces. This translates into double the dollars that were available three years ago.
- Increased the participation and investment in marketing partnerships by leveraging involvement of new partners and increased investment with existing partners.
- Supported regional tourism initiatives with the Destination Marketing Programs.
- Supported travel trade activities with Wholesaler Accords.
- Developed a Product Market Match Study which identifies a basis for scoring and ranking tourism products on both product and market criteria.
- Developed a new product development plan that will ensure the experiences we take to market are, in fact, experiences that our visitors are seeking.
- Developed a business case for tourism marketing.
- Doubled the marketing programming budget in the first two years.
- Increased the level of communication circulated to industry this year.
- Organized more consultation sessions with industry.

Chair's message

As Chair of the Tourism Partnership Council, it is my pleasure to outline what the Council has accomplished in its second year of operation. Together with industry operators and government, our industry is growing.

We've highlighted our year 2000 achievements, including the results of the Council's 2000 Marketing Plan. While the marketing plan was the first priority of the council, our partnership is more than just marketing. Since November 1999, we've also undertaken activities with respect to a draft Product Development Plan, and completed an updated Tourism Strategy for 2000 which outlines our future plans and priorities for the tourism sector. We've documented some of the accomplishments associated with these activities.

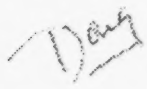
As was intended, our partners continue to contribute where best they can. The industry has significantly increased their financial investment to almost 7 million dollars in marketing programs. Industry contribution has also included a huge time commitment to the process, meeting room space and other in-kind contributions.

Government is supporting our activities through a budget for the tourism marketing and product development programs, as well as funding for administrative support. Staff with both the Marketing and Tourism Divisions have provided invaluable support to our effort, and we thank them for their commitment.

Overall the industry has experienced tremendous growth for many years. And while there have been peaks and valleys, the overall growth trend has been positive. From the Tourism Partnership Council's perspective, we recognize that we didn't meet our ambitious industry targets for 2000. But we're pleased with the performance of our 2000 Marketing Plan. The results of the program give us confidence that we're taking the dollars entrusted to us to promote this destination. We are marketing the right products to the right people. And they are responding.

We trust you'll find this Report Card informative. We also hope you'll join us as we work to strengthen the tourism industry, including increasing resources and investment and addressing the priorities for the Tourism Strategy.

Sincerely,



Doug Fawthrop
Chair, Tourism Partnership Council

Minister's message

It is once again my pleasure to congratulate the Nova Scotia's Tourism Partnership Council on its second year of operation and to thank the members, who have worked tirelessly to strengthen the tourism industry in Nova Scotia.

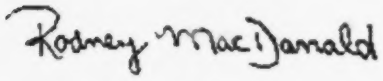
Clearly, our industry is strong and has an impressive impact on our provincial economy. Revenues for 2000 are projected to be $1.25 billion and the number of non-resident visitors is expected to surpass 2.1 million. This is the fourth consecutive year that tourism revenues have exceeded the one-billion-dollar mark. These numbers translate into jobs for more than 35,000 Nova Scotians with a payroll of close to $500 million. These revenues also put $117 million worth of taxes into the province and our municipalities. Also keep in mind that 60 per cent of these revenues is new money into the economy – export dollars that are helping to pay for core services of Nova Scotians.

At the heart of our success is the overwhelming spirit of co-operation and the practice of partnership. A prime example is the Tourism Partnership Council. All along this partnership has been a pilot. In keeping with our commitment to strengthen the Council, our government has now formalized this shared approach to provincial marketing and tourism development planning.

This year alone, the Council has introduced a new Strategy for Tourism that builds on the priorities identified in the province's economic growth strategy. The Council has also worked on a Product Development Plan that will ensure the experiences we take to market are experiences that visitors seek when they come to Nova Scotia. There is also the annual Marketing Plan, which focuses on our core markets and beyond and at niche markets; such as golf, nature and the outdoors.

This is an exciting time to be in our industry. I hope you will review this report and savour your success as we head towards a new year filled with optimism and ready to meet challenges through innovation, teamwork and energy.

Sincerely,



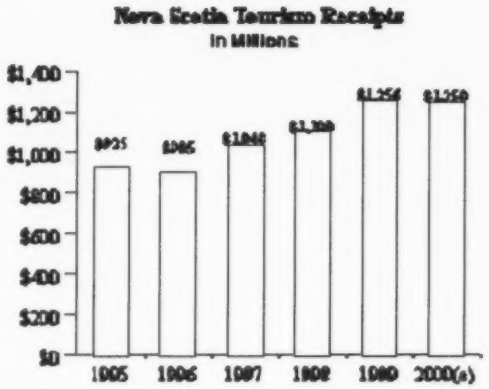
Rodney MacDonald
Minister
Department of Tourism and Culture

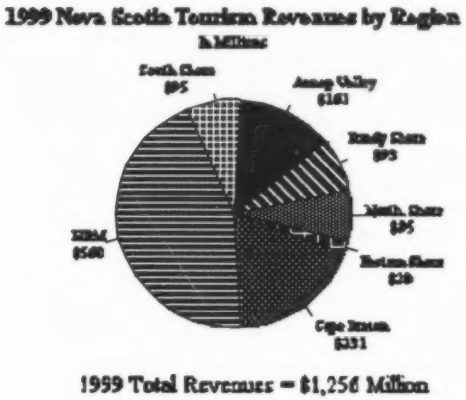
Industry Profile

How important is tourism?

In 2000, tourism is estimated to be a $1.25 billion industry; a one per cent decrease from 1999. Tens of thousands of Nova Scotian jobs depend on tourism activity, and it is expected to only get better. In 2000, it is estimated that the tourism industry in Nova Scotia will generate:

- $1.25 billion in direct revenues
- 35,000 direct and indirect jobs
- $487 million in direct and indirect wages and salaries
- $117 million in provincial and municipal taxes



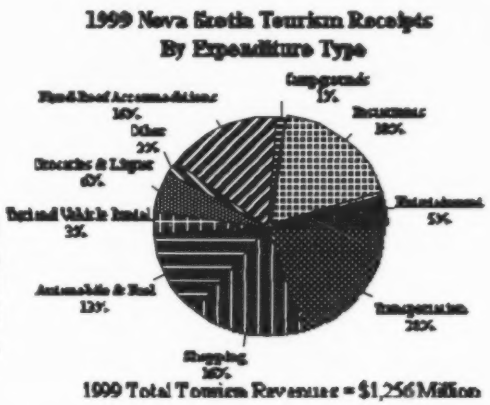


How are revenues shared among the regions?

Both the urban and rural areas of the province benefit from tourism generated revenues. Nova Scotia's regional tourism revenues for 2000 are not currently available.

What businesses benefit from tourism?

Spending by tourists in Nova Scotia benefits almost all sectors of the Nova Scotia Economy. Since this spending generates tax revenues for the municipal and provincial governments, it also helps to support and maintain our essential services like health care, education, police services, and snow removal.

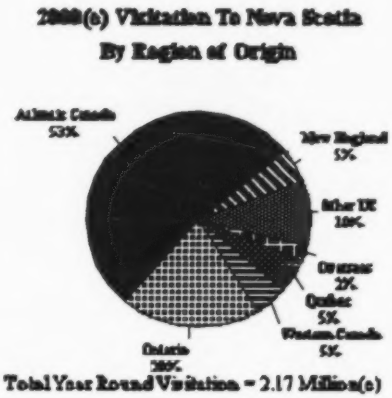


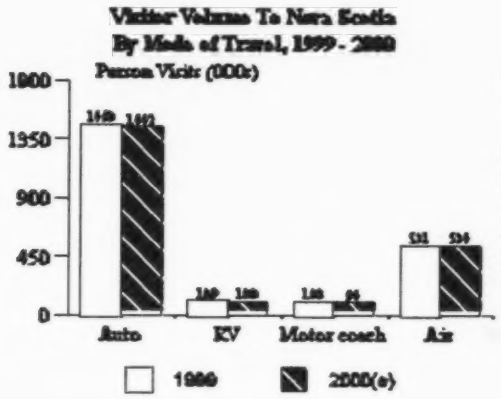
How many people choose Nova Scotia as a travel destination?

For January to the end of December 2000, total overnight, non-resident, visitation to Nova Scotia is estimated to be approximately 2.17 million people. In addition to visitors from outside the province, Nova Scotians make almost six million trips within the province annually, providing significant benefits for the industry.

Who visits Nova Scotia?

The majority of non-resident visitors to Nova Scotia come from other areas of Atlantic Canada (53%). Visitors from Ontario comprise another 20% and other parts of Canada 10%. The US and overseas visitors also make a significant contribution. In 2000, it is estimated that 15% of our visitors come from the United States, while 2% come from other international markets.



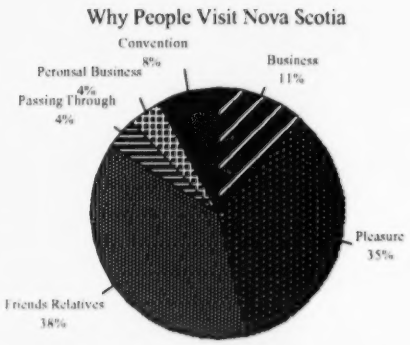


How do they get here?

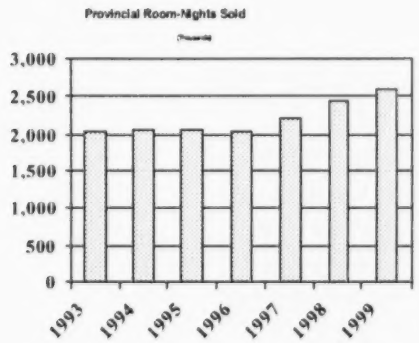
As in the past, most visitors to Nova Scotia travel by car (66%). Air plane (25%), recreational vehicle (5%) and motor coach (4%) account for the remainder. The proportion of visitors arriving by air increased by 1 percent for 2000.

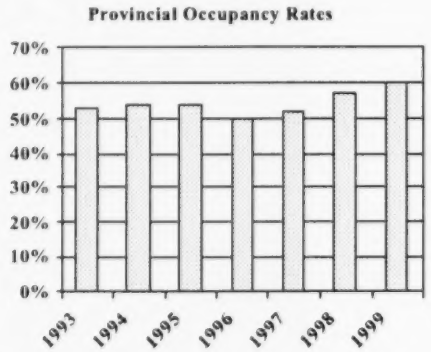
What attracts people to Nova Scotia?

People visit Nova Scotia for many reasons: to take a vacation and enjoy the natural beauty that Nova Scotia offers, to visit friends and relatives, to conduct business, attend conventions, and to take care of personal business.

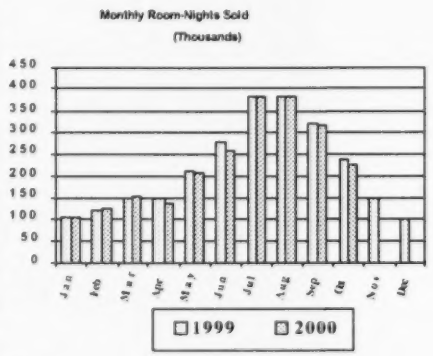


Source: 1996 Nova Scotia Visitor Exit Survey





In 1999, more than 2.5 million room nights were sold in Nova Scotia. This 7% increase over 1998, tops a 3-year upward trend in the accommodation sector. In fact, the number of room nights sold in Nova Scotia has increased by 27% since 1993. The 1990's also saw some dramatic changes in the number and type of accommodations available. (e.g. universities are now offering their residences as hostel-type accommodations during the summer months.) Despite these capacity increases, the provincial occupancy rate has continued to climb, reaching 60% in 1999.



Seasonality continues to be an issue within the tourism industry in Nova Scotia. Despite continuing efforts to make Nova Scotia a four-season destination, the province has a seasonal pattern with visitation steadily growing from January reaching a peak in July and August and steadily declining again to December. One of the objectives of the 2001 Tourism Marketing Plan is to reduce the dramatic fluctuations in room sales by increasing visitation in the shoulder and non-peak seasons.

The Nova Scotia Tourism Strategy 2000

Building on success

In 1996, the tourism sector in Nova Scotia collectively developed a document entitled "*Strategy for Tourism.*" This strategy was the result of an unprecedented co-operative effort of the provincial government, the Tourism Industry Association of Nova Scotia, Voluntary Planning and the Atlantic Canada Opportunities Agency. The goal of revenue growth in that strategy was achieved two years ahead of schedule, when annual tourism receipts cracked the billion-dollar mark in 1998.

The ideas in the 1996 *"Strategy for Tourism"* remain valid to this day, but we knew it was time to renew our focus. We began work in 1999 on the development of a new long term tourism strategy, guided by the Vision Committee of the Tourism Partnership Council - itself a legacy of the 1996 document.

A starting point

With the Tourism Partnership Council (TPC) still a relatively new entity, its vision and mission are valid starting points for our new strategy.

> **TPC Vision Statement**:
> *"Realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians."*
>
> **TPC Mission Statement**:
> *"The Nova Scotia Tourism Partnership Council's mission is to grow the tourism industry in the province, increasing the number of tourists that visit Nova Scotia and increasing the amount they spend while in the province."*

Based on the vision and mission, three high-level goals have been identified for the Nova Scotia Tourism Strategy 2000:

- ***Industry Growth*** - The 2000 strategy is intended to have a direct effect on economic growth for the tourism industry, individual business and the Nova Scotia economy.
- ***Sustainability*** - This strategy focuses on ensuring that the actions taken to grow the industry can be sustained for years to come and the things that are done today will provide a solid basis for long-term economic growth.
- ***Quality of Life*** - As well as generating directly to revenues, tourism contributes economically to the quality of life for all Nova Scotians by providing employment, as well as generating tax revenues to fund health care and education. Tourism also provides infrastructure and recreational facilities which benefit tourists and Nova Scotians.

The vision, mission and high-level goals provide the general context for all elements of the strategy which follow.

Grassroots input, market-driven logic

Extensive consultations through general input sessions with industry across the province, as well as key informant interviews with industry and government tourism professionals were conducted in May 2000. Based on this input from more than 300 tourism operators and stakeholders, a number of key issues have been identified as pertinent to our strategy:

- The original goals of the 1996 strategy are still valid
- Seasonality is a fundamental issue
- Preservation of our natural environment
- Maintenance and upgrading of infrastructure
- Transportation access
- The new economy, e-commerce and the Internet
- Industry collaboration is essential
- Human resource needs
- More co-ordinated effort by a variety of provincial government departments
- Product development opportunities
- Role of the RTAs and VICs
- Expand partnerships and create networks

The world as we know it

Using information from industry consultations, along with our own extensive research, describes our business environment. One way of making sense of all this material is to sort it according to strengths, weaknesses, opportunities and threats. This process, commonly known as a SWOT analysis, helps us organize our thoughts about the strategy, set strategic objectives, and devise action plans to achieve those objectives.

Strengths:	***Weaknesses:***	***Opportunities:***	***Threats:***
- Products: scenery, seacoast, history, culture and heritage, nature and outdoor, urban experiences, golf, meetings, cruise - Partnerships - Price competitiveness	- Capacity - Transportation access - Size (resources) - Seasonality	- Touring Markets - Niche Markets - Seasonality - Growth in air travel - Demographic trends	- Competition - Fuel prices - Exchange rate changes - Fiscal environment - Access to capital - Concentration in distribution channels

The Essence of the Strategy
Given our fundamental strength as a seacoast destination, the fact that there is demand for our product strengths and also factors that could potentially undermine those strengths, the essence of our strategy is to:

Protect, Develop and Communicate
Our Identity
As a Seacoast Destination

Strategic Objectives
This strategy addresses high-level goals with six strategic objectives grouped in three levels of priorities:

1st Level Priorities
- ***Grow revenues from the touring market*** - Our traditional markets must be further penetrated by enhancing the current marketing approach and encouraging new product development. An immediate focus would be the implementation of a European travel trade strategy to capture return visits. We will also encourage existing visitors to stay in the province longer and spend more money.
- ***Improve the quality, competitiveness and sustainability of our tourism product*** - Build a collaborative approach to enhance quality within the industry, emphasizing communications and standards.

2nd Level Priority
- ***Build a 12-month season*** - Build partnerships between communities and industry to increase shoulder and winter season visitations and spending.

3rd Level Priorities
- ***Develop viable niche markets*** - Strengthen key niches, such as *outdoor nature, golf* and *group tours* by creating a product development plan addressing niches. More packaging and marketing initiatives will be created around niches.
- ***Improve transportation access*** - Improve infrastructures to support efficient, convenient transportation.
- ***Improve the business environment for tourism*** - Through policies, plans and partnerships create an environment that is conducive to a healthy, sustainable and responsible growth of the tourism industry.

An integrated effort around these objectives will help us reach our high-level goals of *industry growth, sustainability* and *quality of life* for Nova Scotians. Each of these objectives is identified within the strategy for the next one to five years.

Highlights

There are several elements within these objectives that will have the greatest immediate, incremental impact on the tourism industry in the short to medium-term that must be identified.

The following highlights identify the specific areas that are the immediate focus:

- ***Seasonality*** - As one of the major strategic objectives, the development of an integrated approach of product development and marketing among partners will increase shoulder and winter season visitation and spending.
- ***Air Access*** - Recognized as an immediate priority in the strategy, improved air access to our province is a necessary pre-existing condition for achieving our market opportunities.
- ***Travel Trade*** - This is an integrated part of our strategy for each of our market opportunities. It is imperative to work in partnership with the businesses that make up this distribution channel.
- ***Internet*** - This marketing tool will assist in improving the business environment within Nova Scotia. Internet is used everywhere within the elements of this strategy as a means to deliver programming and results, as well as developing new technical capacity, such as e-commerce.
- ***Market-driven Product Development*** - The 2000 strategy integrates product development with marketing, policy and research functions to address and co-ordinate common strategic objectives. There is a need to develop new products to fulfill changing customer needs.
- ***Co-ordination and Integration*** - The strategy is structured to promote approaches to common objectives that co-ordinate the efforts of partners and functional disciplines, such as policy, marketing and product development.

Reporting on Results

Measuring results is a key component of any strategy, because it tells us what is working and what isn't, and ensures accountability. The Tourism Partnership Council will report on progress toward this strategy's high-level goals annually, in the form of a TPC report card.

Our plan identifies measurable objectives associated with the six strategic objectives. All partners who agree to participate in the strategy activities will be asked to report annually on the appropriate measurable objectives.

Getting There

A strategy has limited usefulness if it doesn't address the general game plan for achieving our objectives and goals. That game plan has to outline the general approach and co-ordinate and assign responsibility for specific actions.

In this strategy, the game plan is called the "Integrated Action Plan" and it is a detailed statement of who is doing what to achieve common goals. This action plan forms the template for our annual product development and marketing plans and details other activities, including those agreed to by the TPC partners.

The action plans are one of the main methods for ensuring integration and co-ordination of effort, because it lines up different business functions to address common objectives.

Correcting the Course

No plan is perfect! We anticipate the need to adjust our plan over the next few years. The TPC will consider proposed amendments to the plan according to a prescribed process that formally records changes to the strategy, along with the rationale for the change. Research, evaluation and continuous consultation with industry partners will help ensure that we stay on track, anticipate change and make appropriate adjustments to our strategy.

All Together Now...

Ultimately, no one organization will determine how successful we are in achieving our goals and realizing our vision for the tourism industry in Nova Scotia. We can and *will* work collectively and co-operatively to grow the industry, ensure sustainability and improve the quality of life for all Nova Scotians.

What we've done

Marketing Nova Scotia

After four straight years of solid increases in visitation and receipts, including a record-breaking growth rate in 1999, Nova Scotia's tourism industry experienced mixed results in 2000. On one hand there is plenty of evidence that our marketing programs generated very positive returns. At the same time, despite our success at the marketing program level, this was not enough to reverse what was apparently a soft year for the industry throughout much of Canada. Further, we were able to sustain the same level of marketing activity as last year in spite of a decease in the marketing budget.

Year-end tourism industry indicators are not available at this time, but we are able to look at how things were shaping up, as of the end of September. It is important to remember that the *overall* industry indicators include all types of travel – regular business travel, visiting friends and relatives and other miscellaneous categories, not just the travelers targeted by our marketing programs.

Marketing Committee Members

- Co-chair Doug Fawthrop, White Point Beach Resort
- Co-chair Marsha Andrews, Department of Tourism and Culture
- Bob Boyd, Department of Tourism and Culture
- Jon Denman, Denex Group Inc.
- Victor Ferreira, Delta Hotels and Delta Halifax
- Michele Inglis, Landmark Vacations
- Sherri MacArthur, Enterprise Cape Breton Corporation
- Scott MacAulay, Inverary Resort
- Ella McQuinn, McQuinn & Company Marketing
- Brian Rodney, Best Western Mermaid and Capri Motels and Captain Kelley's Restaurant
- John Somers, Department of Tourism and Culture
- Hank Stackhouse, Delta Hotels and Delta Barrington
- Cathy Kalil, Tourism Partnership Council
- Peggy Tibbo-Cameron, Tourism Partnership Council

Overall Industry Indicators

Non-Resident Visitation

Non-resident visitation is one of our most important indicators of overall tourism industry performance in Nova Scotia. It does not indicate directly how much money is spent, nor does it address the amount of travel activity that was generated by Nova Scotians traveling in their own province. Overall year-round visitation by non-residents reached 2.17 million people this year. Compared to 1999, from May to October 2000, total non-resident visitation was down 2%, with RV traffic down 8%, motorcoaches down 9%, and overall automobile traffic down 1%. Interestingly enough, the bright spot in this story is an overall 1% increase in the air sector. Included in this

statistic is Europe air visitation being down by 20%.
Looking across our most important markets:
Overall Industry Visitation by Origin (January 1 to September 20):

- Atlantic Canada remained stable
- Quebec was down by 5%
- Ontario was up by 5%
- New England was down by 8%

Accommodation Activity

Another important indicator of overall industry performance is accommodation activity, including the number of room-nights sold and the occupancy rate. Unlike traffic data, these results do reflect the impact of Nova Scotians traveling in their own province, but do not include people who are staying with friends and relatives. From January to September, accommodation activity shows a decrease of 1%, in terms of total room-nights sold. This was accompanied by an average occupancy rate 3 percentage points below last year. On the plus side, this drop in utilization may be at least partially offset by a higher average room rate.

Marketing Program Results

Overall, Nova Scotia experienced a 36 % increase in requests for information (or "*inquiries*") that we can trace directly to our advertising efforts. This particular statistic is important to us, because annual program evaluations (known as *"conversion studies"*) show that a good proportion of the potential customers that request the *Doers and Dreamers* guide or other information are then motivated to visit Nova Scotia. Therefore, inquiries "convert" into visits, which means revenues for tourism operators.

Interest generated by advertising

The overall results are very positive for our marketing programs, but the results do vary significantly by market:

- Atlantic Canada inquiries are down 5%
- Ontario inquiries are up 24%
- Quebec inquiries are up 87%
- New England/Mid-Atlantic inquiries are up 33%

Marketing Success Stories

As far as individual marketing programs are concerned, we have some great successes to report:

- Continued heavy use of direct marketing with a repeat performance of last year's significant increases in tourism literature requests.
- Seasonality initiatives: a successful Mid-Winter Blitz Campaign, Spring Vacation Ideas Book, Fall Vacation Ideas Book, direct mail partnerships with Prince of Fundy and Bay Ferries, as well as fall direct mail partnerships with Royal Airlines and ECBC.
- Successful East Coast Music Awards campaign with our partner, Oland Specialty Brewing Company (a.k.a. Keith's) generated close to 20,000 inquiries.
- Generated new partnership activities, including our Nova Scotia/New Brunswick Bay of Fundy Campaign.
- Leveraged Atlantic Canada Tourism Partnership dollars and private sector partnership dollars to promote the Nova Scotia brand in the Maine market.
- Increased use of in-province point-of-sale kiosks, of which approximately half are now open year-round.
- Launch of Bras d'Or service between Halifax and Sydney by VIA Rail Canada.

With the visitation currently below last year's level, it is unlikely that 2000 will eclipse the record setting $1.256 billion in overall tourism industry revenues set last year. The bottom line - given the previous growth trend, 1999 is proving to be a tough act to follow! That said, we had some great successes in areas of the industry that we can most directly influence.

Travel Trade Strategy

- A Travel Trade Task Force was recently organized by the Tourism Partnership Council to:
  - review the current travel trade strategy draft,
  - receive comments from the Task Force members on the direction of the current travel trade strategy, and
  - obtain suggestions by members to improve/enhance the strategy.
- A major part of a travel trade strategy is building relationships with tour operators and travel agents within our target markets. We must ensure that our partners, such as tour operators and travel agents, are aware of what products are available and have the tools to sell them.
- The task force is in the preliminary stages of enhancing the current travel trade document.

- Members include:
  - Minto Stewart, Department of Tourism and Culture
  - Doug Fawthrop, White Point Beach Resort
  - Anne Freiss, Canadvac Travel Services Ltd.
  - Gary Powell, Atlantic Ambassatours Gray Line
  - Bob Sime, Regional Approach Ltd.
  - Pat Lyall, Delta Hotels
  - John Somers, Department of Tourism and Culture

Measuring the success of our marketing efforts

Each year we conduct conversion studies to measure how effective our campaigns are in bringing people into the province. A random sample of people who responded to ads are contacted by phone to determine: whether they visited Nova Scotia; what role advertising played in their decision and how much time they spent in the province. This information is then used to calculate the percentage of inquirers who were influenced by advertising to visit Nova Scotia. We also ask people how much money they spend while they are here, and we use the information to estimate the economic impact of our marketing dollars.

To date, data has been collected for most components of the 2000 conversion study. And while the study is not yet complete, it appears our ad-generated revenue targets will be met.

In April 2000, the 1999 results covered under the three major Air Accord Agreements with Air Canada, Icelandair and Canada 3000 servicing Nova Scotia from Europe were also released. The results of the agreement activities are measured only on the specific European routes covered by the agreements and are as follows:

- There were 11,200 visitors from Germany in 1999, an increase of 9% from the 1998 results; 10,500 from the U.K., an increase of 20% from the 1998 results; 6,100 visitors from other European countries (Netherlands, Scandinavia, Iceland); and 1,700 visitors from other countries (Transit Passengers) for a combined increase (other European countries/other countries) of 8%;

- Total tourism expenditures were $26,735,000. with $11,300,000. spent by visitors from Germany; $8,500,000 from the U.K.; $6,800,000. from other European visitors; and $135,000. from other countries. This represents an increase of $4,800,000. over 1998;

- Three-year return on investment (Europe) -- Based on the program expenditure of $900,000., the resulting return for every dollar of program money spent generates $32.33 in tourism receipts and $4.54 in HST ($2.52 provincial tax, $2.02 federal tax).

    - To date, provincial expenditure is $270,000. (30% of $900,000)
    - Every dollar of provincial money spent generates:
        - $107.78 in tourism receipts
        - $15.12 in HST ($8.41 provincial tax, $6.71 federal tax)

Strength in Partnership

We continue to work with partners to grow the tourism industry in Nova Scotia - from transportation carriers to other government agencies to tour wholesalers, Regional Tourism Associations and industry operators throughout the province. Overriding our partnership approach are several operating principles, which include the need to be strategic and to measure activities.

Partnerships enable us to improve visitor experiences through product development initiatives; increase our marketing power and impact by leveraging partnership dollars; penetrate travel trade channels including tour operators and wholesalers; and meet market needs for vacation packaging, information and awareness about all that Nova Scotia has to offer. We're also responding to industry demands for partnership opportunities in key markets.

Partnership highlights

- Nova Scotia's longstanding partnership with Prince of Fundy sells the Nova Scotia destination coupled with the 'how to get here' message of an important transportation partner in a key core market, the Northeast US. For 2000, this partnership focused on an integral mix of programming which included television, newspaper, magazines and direct mail, most of which was partnered with the Canadian Tourism Commission. This enabled us to maximize our strategic marketing efforts while leveraging 30-cent dollars against our own budget.

- 2000 marked the third year of a partnership with Bay Ferries to take advantage of the new "fast-ferry" catamaran service. This partnership included direct mail, television and newspaper advertising in key U.S. and Canadian markets. The partnership also includes an on-site sales presence for Nova Scotia in Bar Harbor, Maine.

- Under the Air Accord program, we also worked with our airline partners, including Air Canada to develop the United Kingdom and Germany markets; Icelandair to develop the United Kingdom, Germany and the nordic countries markets; and Canada 3000 to develop the Germany, United Kingdom and western Canada marketplaces. A new partnership with Royal Airlines was added to strengthen our links to Ontario. The accords are supported by a public/private sector committee consisting of tourism, trade and airport interests. Tourism programs have been underway for three years, already resulting in over $24 million in increased visitor spending, creating 488 direct and 187 indirect jobs and contributing almost $3.2 million in GST.

- In 2000, Nova Scotia partnered with New Brunswick, Tourism Atlantic and the Canadian Tourism Commission to promote the Bay of Fundy as a destination in two new markets - Atlanta, Georgia and Tampa, Florida. The strategy included two separate routes to the consumer - direct mail, magazine and newspaper advertising direct-to-consumer, as well as direct mail advertising to all AAA South members. The campaign time frame was April to June 2000. The recently completed conversion study identified a total of 9000 inquiries with

a net conversion rate of 17 per cent. These encouraging results will be applied to year two.

- We reinforced our outdoor and nature strengths with the Nature & Outdoor Lovers Guide. This new guide was produced in partnership with the Nova Scotia Adventure Tourism Association and featured an insert section of new exciting day adventures. 125,000 copies of the guide and insert were used as fulfillment to all outdoor-related inquiries received through Check-In (Nova Scotia's visitor information and reservations number) and Nova Scotia's official tourism web site: exploreNS.com. The guide was downloaded from the web site over 2,400 times, while the Day Adventure insert was downloaded over 1,700 times. The guide was available at the Visitor Information Centres and the Day Adventure insert was used in the In-province Kiosk Program.

- Our partnership with Golf Nova Scotia entered its second year and included the publication and distribution of 100,000 Golf Nova Scotia Guides. The guide featured member course profiles, including the number one-ranked course in Canada, Highlands Links. The full colour publication was used as fulfillment to golf related inquires from CheckIn and Nova Scotia's official tourism web site. The guide was a key part of the provincial spring and fall regional marketing campaign and was distributed direct to consumers through: consumer trade shows (Toronto, Montreal, Halifax), Visitor Information Centres, member courses and though the In-province Kiosk program.

Air Accord Program

- **An Air Accord Committee** manages the Air Accord Program. Members include:
  - Chair, Hank Stackhouse, Delta Hotels
  - Greg Bent, Department of Economic Development
  - Brad Hodgins, Department of Economic Development
  - Fraser Howell, Yarmouth Airport Commission
  - David Jones, Department of Tourism and Culture
  - Jerry Staples, Halifax International Airport Authority
  - Bill MacDonald, Atlantic Canada Opportunities Agency
  - Colin MacDonald, Clearwater Lobsters
  - Larry MacPherson , Sydney Airport Authority
  - Marsha Andrews, Department of Tourism and Culture
  - David Oxner, Department of Tourism and Culture
  - Gordon Stewart, Terelle Management Inc.
  - Lew Rogers, Halifax Regional Municipality
  - Rick Young, Department of Tourism and Culture
  - Sally Christie, Provincial Air Accord Coordinator

- The Air Accord Committee operates under the principle that air transportation opens Nova Scotia to the world for tourism, trade and investment purposes. Its mandate is to provide direction with respect to the content and implementation of marketing agreements held with the various airlines. Intrinsic to this mandate is the linking of the agreement activities to the

broader provincial marketing program, the involvement of the private sector in these activities, the measurement of the results and the reporting of the results to the tourism industry on a periodic basis.

- In June 2000, after 2 ½ years in operation, the Air Accord Committee achieved its initial marketing mandate and began to examine other areas which impact on air access to Nova Scotia. The Tourism Partnership Council expresses its sincere appreciation to the Air Accord Committee for its fine efforts in the past and looks forward to a strong relationship in the future.

Tour Operator Partnership Program

- Accords are in place with tour operators and wholesalers that offer Nova Scotia products for sale. In 2000, 16 tour operators received support under our **Tour Operator Partnership Program**. Funding was used to support attendance at trade shows, advertising in strategic publications and familiarization tours and marketing support. The program uses the following criteria to qualify participants in the program:

    - For Trade Show Activities - Shows must fall in our core markets; those that the Marketing Division attend are not eligible for support, and shows in regional market (Atlantic Canada) are not eligible for support.

    - Advertising - Ads in provincially-supported publications (Doers & Dreamers Travel Guide, Atlantic Canada Tour Planner and Meeting & Convention Planner) are not eligible for support, details of the advertising program must be presented before support is offered and tear sheets must be provided with invoices.

    - Fam Tour Program - The following formula is used to determine the amount of support given for familiarization tours: $50.00 per person, per day. Details of fam tours need to be presented before support is provided.

    - Report and Evaluation - A quarterly activity report must be submitted by all operators who receive funding. A final evaluation will be in place (developed by the Marketing Division of the Department of Tourism and Culture). This form must be completed and returned for an operator to receive support.

    - Timely Submission of Invoices - All invoices must be submitted to the Marketing Division of the Department of Tourism and Culture by March 31, 2001.

- **A Tour Operator Partnership Program Task Force** evaluates proposals from tour operators. **Members include:**
  - Pat Lyall, Delta Hotels
  - Ella McQuinn, McQuinn & Co. Marketing
  - Cindy Wade, Department of Tourism and Culture
  - Minto Stewart, Department of Tourism and Culture

Destination Marketing Program

- We also worked with many partners under the **Destination Marketing Program.** This $400,000. program, in partnership with local tourism associations, provides many smaller operators with an opportunity to join together to attract visitors to their regions. For example, the Destination Marketing Program can also be used to support regional festivals and events.

- General eligibility criteria for the Destination Marketing Program:
  - A marketing plan must accompany each project proposal
  - Funding support is only available to destination marketing initiatives
  - Marketing activities must include a minimum of 50% private sector financial support (please note, for Categories B and C, "in-kind" support is not eligible as part of 50% private sector contribution)

- Projects must not include other provincial government funding (anti-stacking)
  - Project activities must complement provincial tourism marketing strategy
  - Projects must include quantifiable objectives and a plan for evaluation
  - Where appropriate creative must be submitted for approval prior to final production
  - All projects supported under the program should include Nova Scotia visual identification and/or credit Tourism and Culture support

- **A Destination Marketing Committee** manages the Destination Marketing Program. **Members include:**
  - Bill Hay, Chair, Mastodon Ridge & Showcase Nova Scotia
  - Lynne Perry, South Shore Tourism Association
  - Patricia Lynch, Department of Tourism and Culture

  - A limited portion of the funds have not been allocated and applications are still being reviewed by the Committee for the 2000/2001 Destination Marketing Program. To date projects supported by the program include: Northumberland Strait Marketing Group Campaign, Metro Radio Group, Winter Guide to Southwestern Nova Scotia, Eastern Shore Radio Campaign Targeting P.E.I., Halifax Entertainment Season, Nova Scotia Professional Theatre Alliance Marketing Campaign and Studio Rally. All proposals to the program must be received by the Destination Marketing Committee by December 15, 2000.

Other Partnerships

- We also pursued ongoing partnerships with the Canadian Tourism Commission, the Atlantic Canada Tourism Partnership, Atlantic Canada Opportunities Agency and Enterprise Cape Breton Corporation, with numerous joint initiatives undertaken to build Nova Scotia's reputation as a world-class, four-season destination.

- For example, in Europe, we undertook partnerships with the Canadian Tourism Commission and the other Atlantic Provinces to market Atlantic Canada in the UK and Germany.

- In the South-Atlantic and Mid-Western States, a number of joint marketing efforts with key partners were pursued. For example, we're working with New Brunswick to increase awareness of the Bay of Fundy as a phenomenal destination with pre-eminent touring and outdoor opportunities. Focus groups were conducted in Atlanta and Tampa. The program will be implemented with the co-operation of the Bay of Fundy Product Club, which is comprised of interested organizations and businesses surrounding the Bay of Fundy. The Club operates with funding support from the Canadian Tourism Commission, and is acting as the proponent with Atlantic Canada Opportunities Agency for the joint marketing initiative between Nova Scotia and New Brunswick.

- We also have operator partnerships in place. They are open to a wide scope of operators and include travel guide advertising, co-operative advertising, direct mail and fulfillment opportunities and familiarization (fam) tours. **In terms of fam tours alone, every dollar the province invests is matched four times over by industry.** The partnership program for industry operators differs according to market.
    - In Atlantic Canada, partnership opportunities include the Destination Marketing Programs, Spring, Summer and Fall Vacation Ideas Books, and the Festivals and Event Digest.
    - In Ontario, partnership opportunities include Toronto Star Newspaper impact sections.
    - In New England and the Mid-Atlantic States, partnership opportunities include Yankee Magazine and Boston Globe newspaper impact sections.
    - In Quebec, partnership opportunities include participation in the "Ici, on parle francais," program, and our French travel guide "du réve à l'Adventure Guide touristique."

Now that the 2001 plan is well in hand, the Marketing Committee will work on an evaluation summary of 2000 activities. A new task force will then be struck to begin developing the 2002 plan and its components.

Product Development

The Product Development Committee is working to ensure the competitiveness and market readiness of Nova Scotia's key products, destinations, attractions and tourism industry members. The committee also facilitates a supportive environment which encourages the development of tourism in Nova Scotia.

Members include:

- Co-chair, Bill Hay, Mastodon Ridge
- Co-chair, David Oxner, Tourism Division, Department of Tourism and Culture
- Peggy Anderson, Kidston Landing Country Store Ltd.
- Bruce Anderson, Bell Bay Golf Club
- Doug Fawthrop, White Point Beach Resort
- Lou Leith, Budget Car and Truck Rental
- Pat Nelder, Cape Breton Lake Charters
- Glen MacDonald, Dundee Resort and Golf Club
- Don Mingo, The Mingo Group
- Cathy McKenzie, Enterprise Cape Breton Corporation
- Sara Napier, Region of Queens Municipality
- Rob McDonald, Atlantic Canada Opportunities Agency
- Mart Johanson, Parks Canada
- John Hennigar-Shuh, Nova Scotia Museums, Department of Tourism and Culture
- Bob Book, Tourism Division, Department of Tourism and Culture
- Darlene MacDonald, Tourism Division, Department of Tourism and Culture
- Peggy Tibbo-Cameron, Coordinator, Tourism Partnership Council

2000 Achievements

- **Product Market Match Study (February 2000)** The Product Development Committee completed a major study to prioritize Nova Scotia's most competitive tourism products based on product and market criteria. The Product Market Match Study looked at the tourism products that Nova Scotia has to offer visitors and from a consumer perspective and marketing potential ranked them according to their ability to motivate travel. It's an inventory that identifies what experiences have the most potential from the customer's viewpoint and our competitive position relative to offering that experience.

  The committee initiated the study, because it recognized that not all tourism products in Nova Scotia are market-ready and are of varying appeal in the marketplace. While there have been various individual tourism product studies conducted in Nova Scotia over the past few years, there has not been an effort to collectively prioritize and rank the province's tourism products. This initiative will be the foundation for strategically focusing and prioritizing provincial and regional tourism products in establishing a Nova Scotia Product Development Plan.

- **Regional Presentations of Product Market Match Study (May 2000)**. As part of the regional consultations conducted for the development of the new Tourism Strategy, members of the Product Development Committee presented the results of the Product Market Match Study at seven regional meetings. The results outlined the basis for scoring and ranking tourism products on both product and market criteria. The product rankings were presented for the province and for regions within the province. As one of the deliverables of this study, the Product Market Match Model is a computer-based tool which will assist the province, regional organizations and the tourism industry in preparing product development strategies and in setting priorities. The Model is designed to be updated as new market data and insights become available, and also to be "fine-tuned" to reflect different provincial and regional priorities.

- **Product Development Plan: Discussion Paper (November 2000)**. Based on input from the May consultation sessions and the results of the Product Market Match Study, the Product Development Committee have developed a Product Development Plan: Discussion Paper. Structured around the strategic objectives identified in the Tourism Strategy, this plan identifies product development objectives and potential actions. The Product Development Plan: Discussion Paper was presented at the annual Tourism Conference on November 7, 2000. The next steps include distribution to the industry for comments, revisions and updates by the Committee based on feedback. A series of meetings with stakeholders will be conducted to gather more input. As part of the process, the Product Development Committee will identify specific actions for 2001 and beyond that they will implement. The intention is to have a finalized plan for implementation by April 2001.

- **Rural Tourism Partnership Program**. The Committee reviewed and provided input on the new program which focuses on developing the market readiness of Nova Scotia's most competitive tourism products, destinations, operators and communities.

The Committee has also been active on other fronts, including:

- **Ici on parle francais:** In its second year of implementation, participation in the Ici on parle francais program has grown to 130 tourism operators. In order to evaluate the level of service, a preliminary "mystery shop" program was implemented to evaluate 40 participants. Results from the evaluation program will be used to determine future initiatives and to increase participation in the program.

- **Autumn Leaf Watch:** In response to the need to extend the season and awareness of our fall touring product, the Autumn Leaf Watch program identifies premier fall foliage locations and reporting the change of leaf colour. This information is distributed through the province's official tourism web site (www.exploreNS.com/leaf), a toll-free number and interpretive brochures. The brochures were also used for fulfillment with the fall marketing campaign.

- **Bay of Fundy:** As one of the CTC funded Product Clubs, the Bay of Fundy Product Club initiated a number of programs to assess market readiness of operators and to familiarize them on the complete Bay of Fundy experience.

- **Best Practice Missions (Tourism Atlantic):** The Committee reviewed and provided input on the potential Best Practice Missions being offered through Tourism Atlantic.

- **Coastal Access:** Stakeholders met in May 2000 to discuss the issue of coastal access. The Committee will continue to address this issue.

- **CTC Product Development:** Bruce Anderson participates on the CTC Industry and Product Development Committee and serves as a liaison to the Council through the Committee. Feedback has been provided on CTC industry and product initiatives and a letter was sent to the CTC by the Council supporting its role in product development.

Future plans:

In the upcoming months, the priority of the Product Development Committee will be to revise and finalize the Product Development Plan. This will be done through consultations with stakeholders and incorporation of comments in response to the feedback from the Discussion Paper.

The Product Development Committee will develop an action plan for 2001, which will identify specific priority actions they will implement based on the Product Development Plan. The target date to begin implementation is April 2001.

In addition, the Committee will have an active role in evaluating the Rural Tourism Partnership Program. This evaluation will determine the effectiveness and impact of initiatives funded under the program.

Vision

We also have a Vision Committee that incorporates both long-term strategic planning for the council, and marketing and product development planning for the tourism industry. This year the committee expanded its membership and functioned as the Steering Committee for the Tourism Strategy 2000.

Members of the Tourism Strategy Steering Committee included:

- Chair, Paul Stackhouse, Holiday Inn Harbourview
- Bruce Anderson, Bell Bay Golf Club
- Marsha Andrews, Department of Tourism and Culture
- Bob Book, Department of Tourism and Culture
- Judith Cabrita, Tourism Industry Association of Nova Scotia
- Stephen Coyle, Department of Tourism and Culture
- Doug Fawthrop, White Point Beach Resort
- Bill Hay, Mastodon Ridge & Showcase Nova Scotia
- Cathy Kalil, Tourism Partnership Council
- Robert MacDonald, Atlantic Canada Opportunities Agency
- David Oxner, Department of Tourism and Culture
- John Somers, Department of Tourism and Culture
- Gordon Stewart, Terelle Management Inc.
- Karl Webb, Havenside Bed and Breakfast
- Peggy Tibbo-Cameron, Tourism Partnership Council

2000 Achievements

- Established benchmarks to measure success in the five key result areas, namely Growth, Quality, Capacity, Marketing Efficiency and Business Environment.
- Convened industry input sessions in May around the province to obtain comments and suggestions for inclusion in the overall Strategy.
- Developed the Nova Scotia Tourism Strategy 2000 as summarized on page 9 of this report.
- Identified three levels of priorities for the Strategy and the Implementation Process. These include:

  1st Level Priorities
  - ***Grow revenues from the touring market***
  - ***Improve the quality, competitiveness and sustainability of our tourism product***

  2nd Level Priority
  - ***Build a 12-month season***

  3rd Level Priorities
  - ***Develop viable niche markets***
  - ***Improve transportation access***
  - ***Improve the business environment for tourism***

Future objectives include implementing the Tourism Strategy 2000 and continuing to seek industry

input and consultation.

Communications

A Communications Committee is also in place to keep industry informed about activities under way by the Tourism Partnership Council.

Members include:

- Chair, Peggy Anderson, Kidston Landing Country Store Ltd.
- Marsha Andrews, Department of Tourism and Culture
- Eric Mullen, Canadvac Travel Services Ltd.
- David Miller, McDonald's Restaurants
- David Oxner, Department of Tourism and Culture
- Raymond Tudor, Brier Island Lodge and Restaurant
- Peggy Tibbo-Cameron, Tourism Partnership Council

2000 Achievements

- Continued implementation of the Communications Plan designed to keep stakeholders informed about provincial programs and services, as well as increase awareness and understanding of the importance of tourism to the economy of Nova Scotia and the opportunities and challenges that exist for the industry.

- Updated and revised the Council web site **(www.nstpc.com)** to help operators gain more insight and information on Council programs. The site also has a discussion forum, which enables industry to post messages and others to respond.

- Oversaw the update of a comprehensive tourism stakeholder database.

- Conducted media relations, including issuing news releases and responding to inquiries.

The Committee is continuing to build on communication priorities identified in the plan and will work to get industry operators the information they need when they need it.

Executive Committee

An Executive Committee helps to manage the work load and keeps the Council on track. The group organizes reporting information, brings recommendations forward and oversees internal and external communications. Because of the Council's relationship with government, we have also been called on to make recommendations on broader issues that affect the industry.

The Executive Committee is made up of members appointed by the Council, with the Chair of the Council at the helm. Executive Directors of both the Marketing and Tourism divisions of the Department of Tourism and Culture are also standing members.

2000 Achievements

- Revised the Operating Guidelines for the Council to better reflect the Council's method of operation.
- Co-ordinated consultation on the future of the Tourism Partnership Council in meetings around the province with TIANS, regional and sectoral tourist associations.
- Facilitated discussions regarding the creation of a policy committee.
- Continued to improve relationships with industry associations, as well as, the Atlantic Canada Tourism Partnership and the Canadian Tourism Commission through participation in meetings, seeking input and initiating ongoing communication activities. Further developed a support program to ensure Nova Scotia participation on key CTC committees.
- Future activities will focus on seeking more input and hosting more industry consultations; implementing the Tourism Strategy; completing the Product Development Plan; promoting inclusion and increasing membership in all committees; encouraging and building stronger partnerships and development of policies in areas such as:
  - improved competitiveness of the industry
  - infrastructure development including financing options
  - quality/standards
  - visitor information services
  - resource management

Challenges for the Future

The Tourism Partnership Council is celebrating its second full year of operation. Created in May 1998, the Council has enjoyed remarkable success and enormous commitment from both the private and public sector. By all accounts, it's working !

While the Council has been successful, there is always room for improvement and we must continue to strengthen and promote the partnership.

Some of the challenges we need to address in the coming year include:

- Increasing need for resources in both Marketing and Product Development
- Increasing need for industry involvement in the implementation of the Product Development Plan, the Marketing Plan and the long term Tourism Strategy 2000.
- Further improve the ways that industry is able to be involved in and input into the process.
- Build on communication priorities, finding more effective ways of communicating with industry and for them to communicate with the Council.

2001 Priorities

MARKETING PROGRAMS FOR 2001

The Nova Scotia Tourism Partnership Council will continue to build on the successes and knowledge gained from the 2000 Marketing Plan, by improving the best of existing programming with some shifts in emphasis for 2001:

More Internet

2000 was the year we gained the capability to handle CheckIn reservations on-line. While this capability is still very new, it represents a landmark in our ability to bring e-commerce to our already successful Internet marketing efforts. The Internet continues to be our fastest growing communications medium with customers. We will continue to improve our on-line presence by making more seasonal content available on our web site, driving traffic to the site through cross marketing with other media and improving the ease of navigation with changes to the site's structure. Elements of our Internet programming appear throughout our various marketing programs.

More Seasonality

Seasonality is included in the long-term tourism strategy as a strategic objective, and is a major component of this year's marketing plan. With some new marketing experience under our belts with 2000's Mid-Winter Blitz campaign, we will place increasing emphasis on the winter season with a more rounded campaign approach, while continuing to commit resources to season extension in the spring and fall shoulder seasons.

For the winter, most of our effort will be in Atlantic Canada, where much of the product focus will be on activities which are not dependent on a reliable supply of snow. Our approach will be at two levels: shift customers' general mind set about making Nova Scotia a winter destination, while simultaneously providing them with concrete ideas to see and do through retail information. That means partnerships with tourism operators that have the right product for winter will be a critical factor in achieving success.

In 2001, we will build on last year's successful Mid-Winter Blitz program with a more rounded campaign approach to growing tourism in the winter months. We will develop a winter get-away ideas booklet with partner coupons for use as a magazine insert. The winter book will also be included with regional winter tourism publications in a winter get-away fulfillment kit. We will feature special seasonal content on our web site. TV advertising spots, radio and direct mail will generate requests for the kit.

For the spring and fall, or "shoulder" seasons, our products and markets are not all that different from our summer offering. However, we will represent the Nova Scotia vacation experience in a way that makes the target audience (more skewed to couples not traveling with children) think about us as a potential destination in those times of the year. In 2001, we will target Atlantic Canada, Ontario, Quebec and the Northeastern United States with various combinations of print and TV advertising, direct mail, seasonal literature and Internet support.

More Travel Trade

Nova Scotia has worked closely with the travel trade for many years. The travel trade channel is a complex and ever-evolving business environment which seems to defy simple definition and cookie-cutter approaches to marketing partnerships. That's why we created flexible programming to work hand-in-hand with trade partners who can maximize the benefit for Nova Scotia on a sustainable basis. Working with the trade allows us to access customers who are looking for travel packages, speciality "niche" experiences, or those who are more comfortable using a travel agent to plan their vacation, because they are unfamiliar with us.

In 2001, in addition to our work with tour operators, wholesalers and travel agents, we will also introduce a training and certification program that helps our operators understand the needs of this marketing channel.

Measurable Objectives: What we're aiming for in 2001

We are targeting the following performance levels for our 2001 tourism marketing plan:

- Support a five per cent growth in tourism industry receipts over 2000's performance.
- Grow tourism business year round with a ten per cent increase in the total number of room-nights sold in fixed-room accommodations for the November through April period.
- Increase Nova Scotia's share of mind in select markets — Atlantic Canada, Quebec and Ontario.

Now look at how we plan to achieve these objectives.

Touring and General Destination Markets

Our biggest target markets continue to be what we loosely call the "general touring" markets, which we identify by geographical regions. These include visitors who tour around the province and those who come to a destination area and want to experience the wide variety of things to do and see that Nova Scotia offers.

Core and Developing Markets

We refer to these markets as either being core markets or developing markets. Core markets are where we are well established with sizable numbers of visitors, (in most cases) some measurable level of consumer awareness and the expectation that money spent on marketing will have a positive return on investment within the same year. Our core markets include Atlantic Canada, Ontario, Quebec and the Northeastern United States. Our expectations are longer-term in our developing markets, which include Europe, Western Canada and the South Atlantic States.

Travel Trade vs. Direct to Consumer

In broad terms, we take two parallel routes to sell to our customers: we communicate directly with consumers, and concurrently work through the travel trade. The travel trade is a distribution and marketing channel that includes the tour operators, tour wholesalers, travel agents and transportation carriers who are often the intermediaries between us and our customers.

In a given market, where consumer awareness of Nova Scotia is low and there are significant logical, transportation and/or cultural barriers, we place more emphasis on the travel trade as a marketing channel. For example, in Nova Scotia we place very little emphasis on marketing to travel agents. In Ontario and the Northeastern United States, where just one-fifth of our customers use the travel trade, we employ some travel trade marketing. In Europe, where a large proportion of our customers buy packages or buy through travel agents, most of our marketing efforts concentrate on the travel trade distribution channel.

We believe that we can work collectively and co-operatively to grow the industry, ensure sustainability and improve the quality of life for all Nova Scotians.

Who are we — a brief overview

In 1996, there was a genuine commitment to rethinking how government and industry worked together to strengthen the Nova Scotia tourism industry. This acknowledgment coincided with the conclusion of an extensive consultation led by a partnership of Voluntary Planning, Tourism Industry Association of Nova Scotia (TIANS), Atlantic Canada Opportunities Agency (ACOA) and the Nova Scotia Department of Economic Development and Tourism. This resulted in the *Tourism Strategy for Nova Scotia.*

- The industry, led by people who worked on the strategy and the Tourism Industry Association of Nova Scotia approached government about reformulating how we work together. Ultimately, there was a recognized need for joint decision-making in critical areas affecting the industry's bottom line.

- Following consultation, a new partnership was formed, resulting in the Tourism Partnership Council, whose overall mission is to work co-operatively to bring more visitors into Nova Scotia and increase the amount of money those visitors spend.

- The partnership has 16 members drawn from across the province. Seven were chosen to create a geographic balance; seven more were selected provincially; and two members represent government. All were appointed for a two-year period (effective May 1998) from a list of applicants obtained through a public call and based on recommendations from an industry-led selection committee.

- The partnership's mandate is to direct the planning and delivery of provincial tourism marketing and product development programs. In doing so, the partnership enables industry and government to share decisions, responsibilities and resources. Ultimately, a new partnership has meant:
  - true industry participation in the decision-making process; and
  - a better integration of government-industry programs that reflect industry priorities and create greater effectiveness.

- Funding for the Council's activities is supplied through provincial sources already dedicated to tourism, as well as by private sector contributions through investment in marketing partnerships. The Council is staffed with existing employees at Tourism and Culture. Two people perform secretariat functions, with additional support for Council committees provided by the staff of the Tourism and Marketing Divisions of the Department of Tourism and Culture.

- The Department of Tourism and Culture now undertakes initiatives based on the **Council's vision, which is to realize Nova Scotia's tourism potential as a world-class four-season destination for the benefit of all Nova Scotians.**

Moving forward

- The Tourism Partnership Council was developed as a two-year pilot. In discussions with the Minister of Tourism and Culture, we undertook a series of consultations with stakeholders on the future of the Council, including its structure, mandate, membership and priorities. We also distributed a questionnaire that sought feedback on the best approach to serve both industry and government interests.

- In November 2000, the Council was advised that the Nova Scotia Tourism Partnership Council had been formalized and the reference to the "pilot" had been removed.

Tourism Partnership Council Members

- **Chair Doug Fawthrop,** managing director, White Point Beach Resort, Liverpool; past president, South Shore Tourism Association (SSTA); past chair, Canada Select Nova Scotia; member, Air Accord Working Committee; and vice president, Tourism Industry Association of Nova Scotia (TIANS)

- **Vice-chair Paul Stackhouse,** general manager, Holiday Inn Harbourview, Dartmouth; chair, Tourism Strategy Implementation Team; and president, Hotel Association of Nova Scotia (HANS), and board member of TIANS.

- **Peggy Anderson**, owner of Kidston Landing Country Store Ltd., Baddeck; past board member, Canadian Tourism Commission; past president TIANS.

- **Marsha Andrews**, acting executive director, Marketing Division, Department of Tourism and Culture.

- **Nicholas Carson**, general manager, Prince George Hotel, Halifax, Nova Scotia; founding president of the Hotel Association of Nova Scotia; two-term Director of TIANS; chair of the Greater Halifax Conventions and Meetings Bureau

- **Stefi Davies**, owner, Yogi Bear's Holiday Haven Camp Resort, Kingston, Nova Scotia; member of Evangeline Trail Tourism Association; member of Campground Owners Association; and member of TIANS

- **Victor Ferreira,** regional vice president, operations, Maritimes and general manager, Delta Halifax; member, Hotel Association of Nova Scotia (HANS) and the Greater Halifax Conventions and Meetings Bureau. (resigned January 2000)

- **Donald Gunn**, operator and president, Stonehame Farm Ltd., Scotsburn, Pictou County, Nova Scotia; owner of Stonehame Chalets, Fitzpatrick Mountain, Nova Scotia; past president of Nova Scotia Federation of Agriculture; and past president of Maritime Farmers Council;

- **Bill Hay,** owner, Mastodon Ridge and Showcase Nova Scotia, Stewiacke; past president, Central Nova Tourist Association (CNTA), and board member of TIANS.

- **Lou Leith,** branch manager, Budget Car and Truck Rental, Sydney; executive committee member and chair, Tourism Cape Breton.

- **Ella McQuinn,** principal, McQuinn & Company Marketing.

- **David Miller,** owner, McDonald's Restaurants in Antigonish and Port Hawkesbury; member, Planning Advisory Committee for the Town of Antigonish and Tourism Sector of Voluntary Planning.

- **Scott MacAulay**, owner and operator, Inverary Resort, Dundee Resort, Ceilidh Country Lodge and Glenghorn Beach Resort, Cape Breton, Nova Scotia; Partner, Bell Bay Golf Club and the Highland Heights Inn; member of the Hotel Association of Nova Scotia; and member of the Nova Scotia Restaurant Association;

- **Eric Mullen,** managing director, Canadvac Travel Services Ltd.; president of TIANS; private sector representative on the Atlantic Canada Tourism Partnership, Tourism Programs Committee; member, Air Accord Working Committee.

- **David Oxner,** executive director, Tourism Division, Department of Tourism and Culture and member of the Hotel Association of Nova Scotia (HANS)

- **Brian Rodney,** owner, Best Western Mermaid Motel, Capri Motel of Yarmouth and Captain Kelley's Restaurant, Lounge & Pub; chair, Transportation Committee of the Yarmouth County Tourist Association (YCTA); past president of YCTA.

- **Raymond Tudor,** owner, Brier Island Lodge and Restaurant, Westport, Brier Island; member Yarmouth County Tourist Association, Evangeline Trail Tourist Association and TIANS. (resigned May 2000)

- **Karl Webb,** co-owner, Havenside Bed and Breakfast, Hackett's Cove; senior vice-president, TIANS and chair of the TIANS Policy Committee; member South Shore Tourism Association (SSTA) and Nova Scotia Bed and Breakfast Association.

Council Staff

- Peggy Tibbo-Cameron

- Cathy Kalil

Marketing Division
Tourism and Culture

Marsha Andrews, Acting Executive Director
Dianne Kean, Admin/Budget Coordinator
Regional Marketing
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Cary Murray, Marketing Assistant
Trade Promotions
Rick Young, Manager
Carol Longard, Administrative Assistant, Regional Marketing & Trade Promotions
Sales Market Development
Minto Stewart, Director,
Marilyn Meade, Administrative Assistant
Michele Bourgeois, Marketing Officer
Kim Jardine, Sales Manager
Ron Comeau, Sales Manager
Cindy Wade, Market Officer
Creative Services
Pat Lynch, Acting Manager
Colleen Abdullah, Supervisor of Publications
Randy Brooks, Media&Marketing Development Officer
Linda Murphy, Account Executive
Wally Hayes, Photographer
Planning & Research
John Somers, Manager
Paula Richards, Administrative Assistant, Planning&Research and Creative Services
Vacant, Research Officer
Vickie Siscoe, Direct&On-line Marketing Officer
Karen Matheson, Marketing Officer

Tourism Division
Tourism and Culture

David Oxner, Executive Director
Irene Crocker, Administrative Assistant
David MacKay, Manager, Accounting

Quality Services and Signature Resorts
Doug Matthews, Director
Loyus MacDow, Administrative Assistant
Lyn Miles, Quality Services Officer
Susan Jeffries, Sales Manager, Signature Resorts
Kendra Decoste, Quality Services Officer
Sheila Deveaux, Quality Services Officer
Ronald van der Wegeen, Canada Select
Maria Wong, Canada Select
Nova Scotia Signature Resorts
Rene LeBlanc, The Pines, General Manager
Ian Green, Keltic Lodge, General Manager
Rick Draper, Liscombe Lodge, General Manager
Tourism Development
Bob Book, Acting Manager
Jennifer Halliwell, Administrative Assistant
Darlene MacDonald, Tourism Development Officer
Lori Blackburn, Tourism Development Assistant
Bill English, Tourism Development Officer -Cape Breton
Enquiries and Research
Robert Boyd, Manager,
Karen McNutt, Research Analyst
Stephen Coyle, Senior Research Analyst
Jim Falconer, Data Entry Clerk
Brian Marriott, Distribution Supervisor
Philip Snair, Distribution Stores Clerk
Visitor Information Services
Sharon Martin, Manager
Lisa MacIsaac, Visitor Information Officer
Heather Sancton, Field Services
Sadie Thomas-Frye,Supervisor, Portland IVIC
Airport Visitor Information Centre
Odette Jackson,Senior Travel Counsellor
Therese James, Senior Travel Counsellor
Janette Wallace, Senior Travel Counsellor
Tania Sampson, Travel Counsellor
Terrilynn Andrew, Supervisor
Halifax Downtown (The Red Store)
Allan Doyle, Senior Travel Counsellor
International Visitor Centre

Bruce Sutherland, Senior Travel Counsellor

Publications

The following is a list publications which may be of interest to the tourism industry.

- 2000 Marketing Plan Video
- Tourism Partnership Council 1999 Annual Report
- Tourism Partnership Council 1999 Report Card
- The Business Case for Growing Tourism In Nova Scotia
- 2001 Partnership Opportunities Book
- 2001 Marketing Plan Video
- Nova Scotia Product Market Match Study
- Product Development Plan: Discussion Paper
- Nova Scotia Tourism Strategy 2000
- Tourism Business Development Guides
- Fax Flash (bi-monthly)
- Tourism Insights (monthly)

For information on receiving any of these publications, please visit the Tourism Partnership Council web site:

www.nstpc.com

Contacting the Council

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